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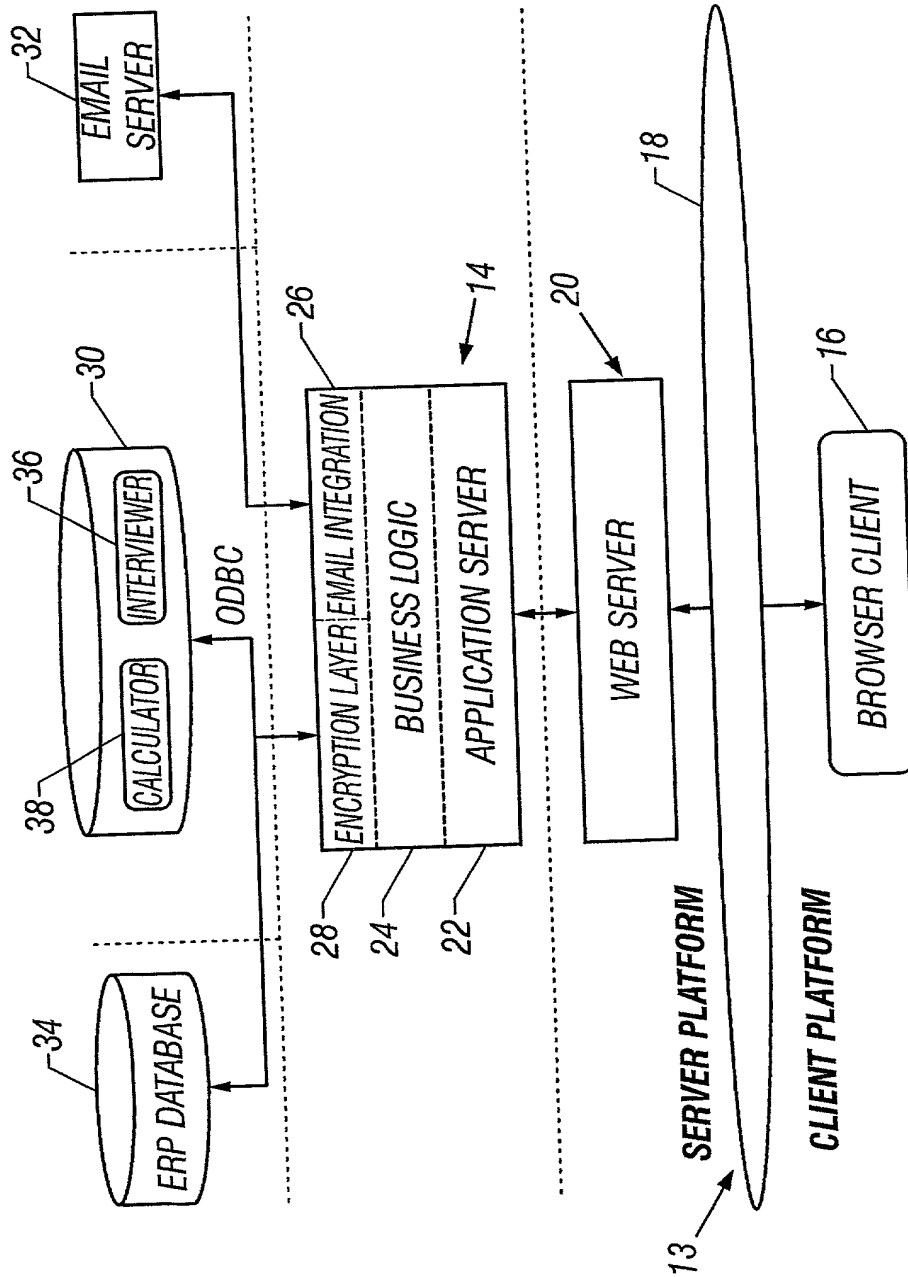


FIG. 1

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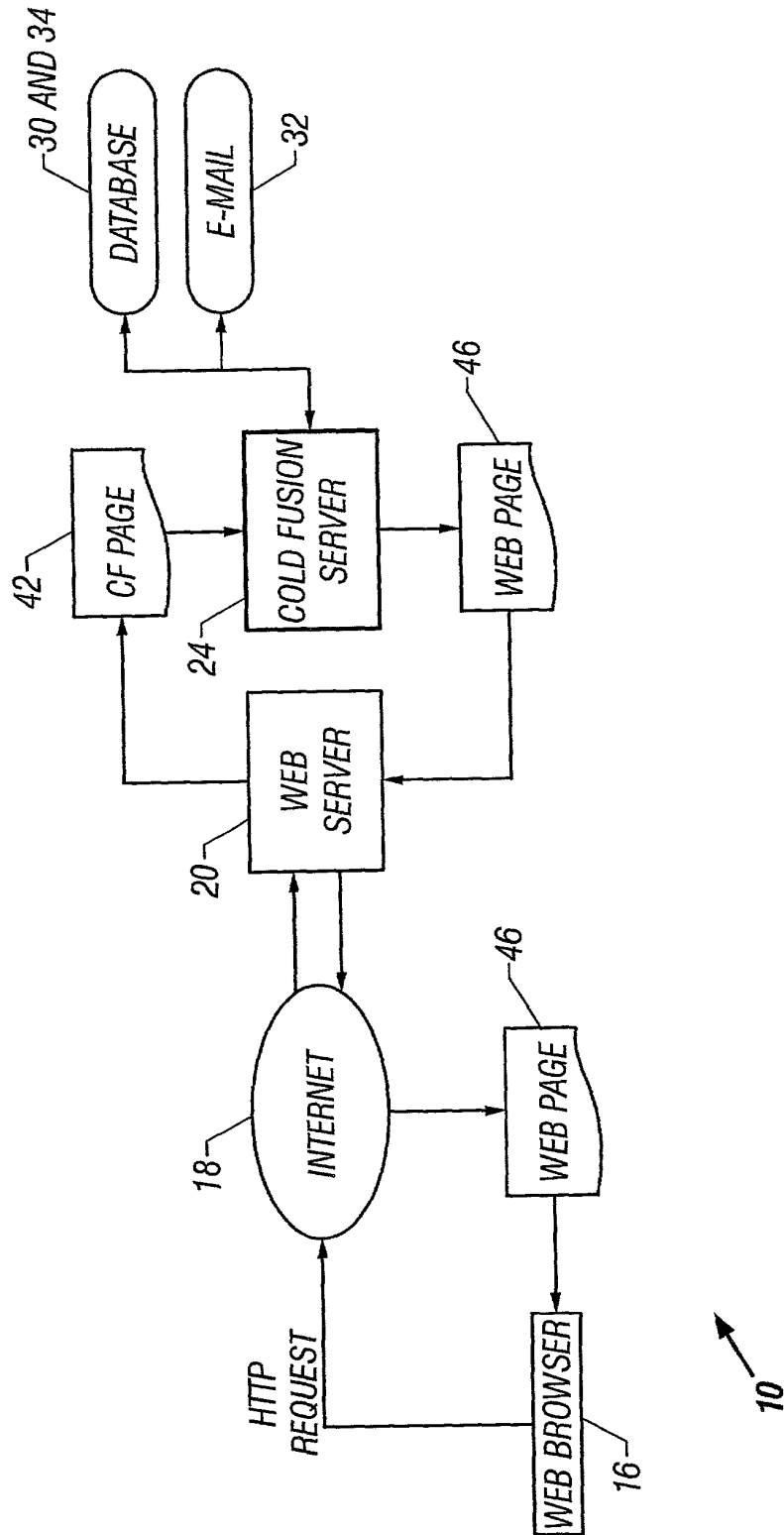


FIG. 2

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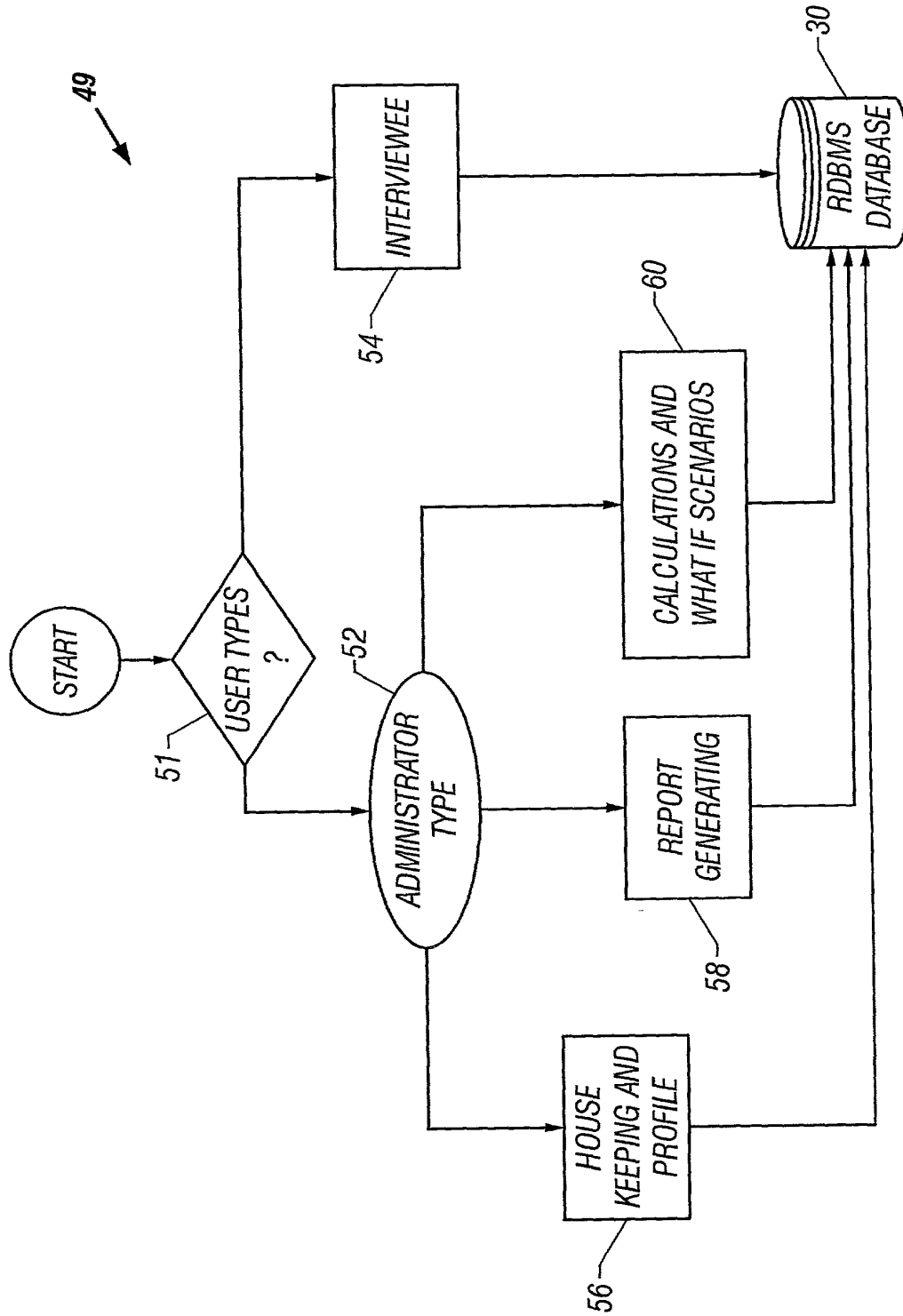


FIG. 3

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FIG. 4

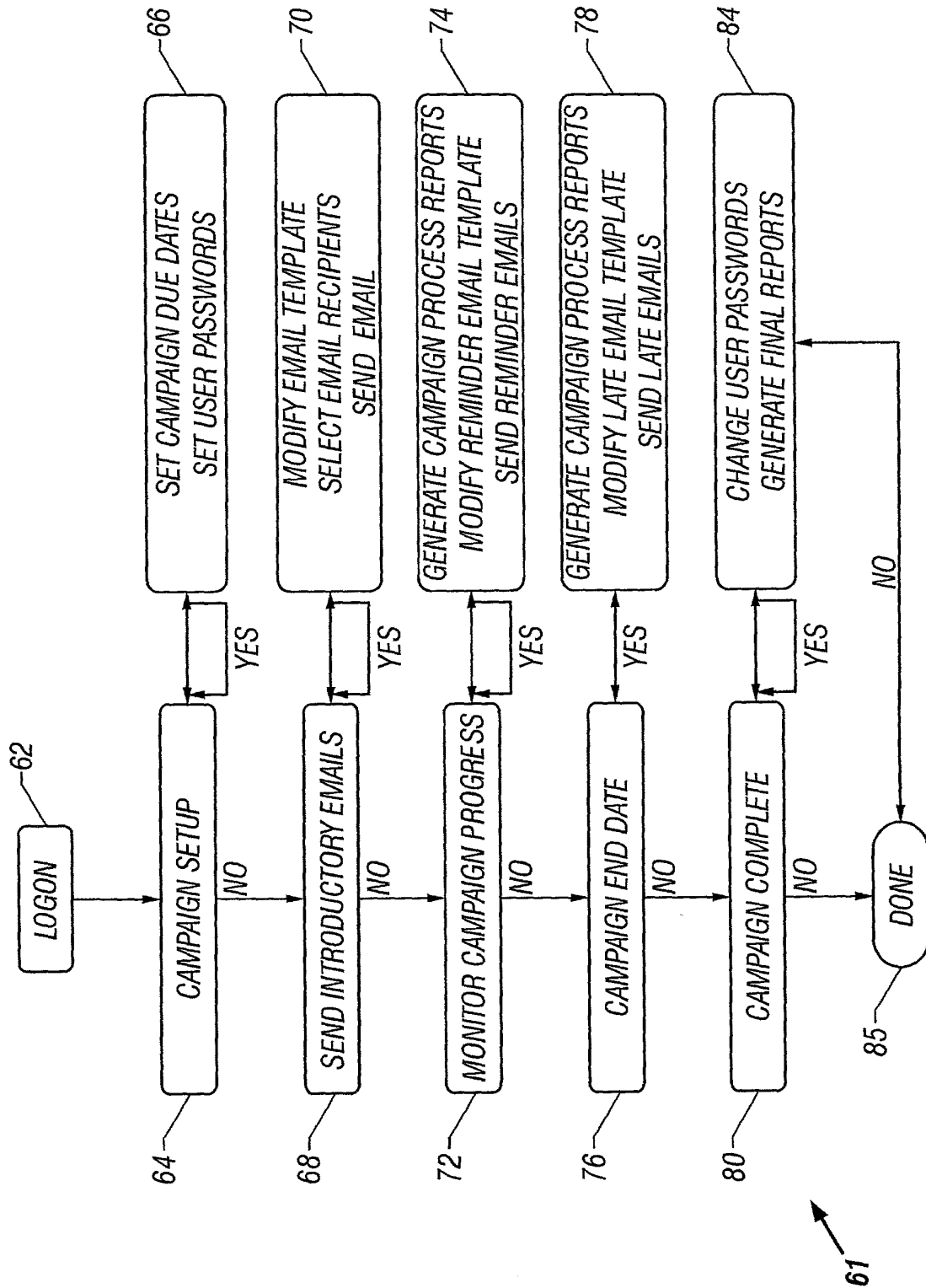


FIG. 4

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File Edit View Favorites Tools Help 88 90 Address Links

Current Company Is **Planitax** Current Year Is **2000**

Select Name **Planitax** Select Year **2000**

Update **Add Year**

Current Department Is "Default Department" Number of employees in all departments is 112

Select Department **100-10-Default Department (3)**

ID: Name:

Add New Department

Employees: Displaying 20 Employees Starting From 1, Number Of Employees In Department Is 3

20 Number Of Displayed Employees Search **Go**

☒ Limit Search To Selected Department Only
Search Is Performed On Sorted Column Only

ID **F.Name** **L.Name** **Title** **Review/** **Send** **Delete**
(Password) **Print**

A-133 ☐ OK Demo Trainee - "Senior Administrator" ☐ **Pltx** ☐

Done 106 112 108 110

FIG. 4A

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File Edit View Favorites Tools Help	
-114- >> Address Links >>	
Add Virtual Employees (Planitax inc. Direct Access)	
50	Add Now
Mailing System:	
<input type="radio"/> Send Introduction Email For Interview Campaign To Selected Managers Only (Two Parts)	
<input type="radio"/> Send Introduction Email For Interview Campaign To All Employees With Email (Two Parts)	
<input type="radio"/> Send Reminder Email #1 To Selected Managers Who Haven't Submitted The Interviewer Yet	
<input type="radio"/> Send Reminder Email #1 To All Employees Who Haven't Submitted A Questionnaire Yet	
<input type="radio"/> Send Reminder Email #2 To Selected Managers Who Haven't Submitted The Interviewer Yet	
<input type="radio"/> Send Reminder Email #2 To All Employees Who Haven't Submitted A Questionnaire Yet	
<input type="radio"/> Send Late Notice Email To Selected Manager Who Haven't Submitted The Interviewer On Time	
<input type="radio"/> Send Late Notice Email To All Employees Who Haven't Submitted The Interviewer On Time	
Send A Hidden Copy Of Every E-mail To: <input type="text"/>	
(Leave Blank If You Don't Want To Send Hidden Copy)	
<input type="checkbox"/> Apply Only To Selected Department	
<input type="checkbox"/> Send Summary E-mail To From Address	
Done	

FIG. 4B

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FOOT-6972260

File Edit View Favorites Tools Help

Address Links

Administrators Information

Representative (Password That Must Be Entered At The First Screen)
Password (This Field Applies To All Years)

Return Mail (From Mail Listed In All Mail Invitational Email)

	Admin:1 (On-Line-Help)	Admin:2	Admin:3
First Name	<input type="text" value="Dante"/>	<input type="text" value="Bill"/>	<input type="text" value="Guest"/>
Last Name	<input type="text" value="Orlando"/>	<input type="text" value="Rebeck"/>	<input type="text" value="User"/>
Email	<input type="text" value="dante@planetax.com"/>	<input type="text" value="bill@planetax.com"/>	<input type="text" value="lori@planetax.com"/>
Password	<input type="text" value="Demo1"/>	<input type="text" value="Demo1"/>	<input type="text" value="Guest"/>

120

Employee Passwords:

122

Reports:

124

Done

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FIG. 4C

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HTML Report - Submitted Questionnaires
File Edit View Favorites Tools Help
Address Links

ADMINISTRATOR'S ACCESS

Tracking Reports Submitted By Managers

126

☐ Submitted Questionnaires
☐ Not Submitted Questionnaires
☐ Submitted Questionnaires Between Dates

Month Day Year
From: 1 / 1 / 2000
To: 12 / 31 / 2000

R&D Reports

128

☒ Average R&D Percentages By Department
☐ R&D Percentages By State-Detail Report
☐ R&D Percentages By Department-Detail Report
☒ Print Each Unit On Different Page

SHOW REPORT SHOW REPORT IN A NEW WINDOW

FIG. 4D

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HTML Report - Submitted Questionnaires

File Edit View Favorites Tools Help

GO BACK

GO BACK

WorldWide
Financial Corp.

R&D Tax Credit - Summary Reports
Average R&D Percentages By Department
Calendar Year: 2000

Department	Department Name:	No. Of Quest For Dept	Average R&D%
100-10	Default Department	3	60
100-1001	Architecture & Validation	11	59
100-1002	XYZ Development Team	14	48
100-1006	PC Firmware	13	77
100-1007	PC GM	21	0
100-1011	R&D SW 1	9	17
100-1014	S/W Localization	17	0
100-1015	System Interfaces	10	49
100-1016	Software Validation	8	100
100-1018	PRX Hardware	8	26
Summary: 11 Department			

GO BACK

FIG. 4E

FIG. 4F-1

File Edit View Favorites Tools Help						
					Address Links	
R&D Questionnaire Detail Report By State Calendar Year: 2000						
State: CA						
Employee Name	Title	Dept.	Num.	Research	Superv.	Neg R&D
Melanie	2 Camberlango Tester	0	0	0	0	100
CA Average		0	0	0	0.0	100.0
State: CA Average All Department						
		0	0	0	0.0	100.0

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State: CA									
Employee Name	Title	Dept.	Num.	Research	Superv.	Support	R&D	Neg R&D	
Demo200	Engineer	100-10		50	50	0	100	0	
Paul Jordan	Manager	100-10		0	80	0	100	0	
CA Average 100-10	Default Department			25	65	0	100.0	0.0	
State: CA Average All department									
				25	65	0	100.0	0.0	
State: CA									
Employee Name	Title	Dept.	Num.	Research	Superv.	Support	R&D	Neg R&D	
Mick Botecelli	Vocals	100-10		0	0	0	0	100	
CA Average 100-10	Default Department			0	0	0	0.0	100.0	
Brenda McKenna	St. Engineer	100-1001		25	5	100	100	0	
Christophe Rosen	St. Engineer	100-1001		0	4	54	58	42	
David Jow	St. Engineer	100-1001		4	45	4	53	47	
Marc Lindley	Engineer	100-1001		4	4	45	53	47	
Matthew Baily	Engineer	100-1001		0	100	4	100	0	
Paula Hung	St. Engineer	100-1001		2	8	36	46	54	
Done									

FIG. 4F-2

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File

Edit

View

Favorites

Tools

Help

WorldWide
Financial Corp.

R&D Questionnaire Statues Report
Submitted Questionnaires
Calendar Year: 2000

Summary: 0 Managers

GO BACK

GO BACK

Done

FIG. 4G

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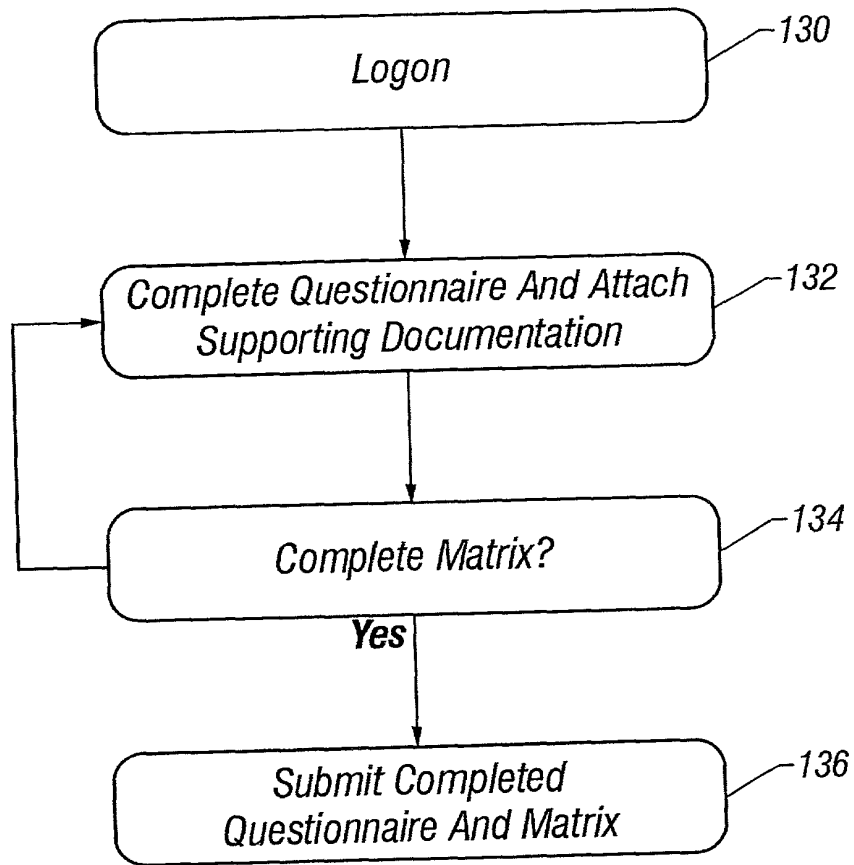


FIG. 5

FIG. 5A

FIG. 5A



FIG. 5B

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FOODOT 69724860

R&D Interviewer

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HOME

INSTRUCTIONS

QUESTIONNAIRE

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Offered By

PLANITAX

MATRIX

MATRIX For Manager Brenda MCKENNA

R&D Percentage:

Direct Research: 25 %

Direct Supervision: 5 %

Direct Support: 100 %

Total R&D %: 130%

Total non R&D %: 0%

Save

Warning!

171

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A Red Number Signals That The Sum Of The R&D % For A Given Employee Is Greater Than 100%

GO BACK

PROCEED

FIG. 5C

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File Edit View Favorites Tools Help

Address Links

Matrix For Manager Paul Jordan

To Expedite The Completion Of This Schedule, Insert Percentages In All Fields Before Clicking On Enter Or Save Button

Name	State	Direct Research		Direct Supervision		Direct Support		Total R&D		Total non R&D	
		%		%		%		%		%	
Dave Crump-100-1006	MA	50		25		0		75		25	
Harsh Olin-100-1006	MA	100		0		10		110		0	
James Allison-100-1006	MA	45		55		0		100		0	
Jane Scool-100-1006	MA	30		0		0		30		70	
Jay Conley-100-1006	MA	80		0		0		80		20	
Jeffrey Davis-100-1006	MA	60		0		20		80		20	
Jeffery Schmidt-100-1006	MA	100		0		0		100		0	
Laurence Raven-100-1006	CA	50		0		0		50		50	
Michael Wolf-100-1006	MD	80		0		0		80		20	
Robert Goodall-100-1006	MA	100		0		0		100		0	
Robert Salerno-100-1006	MA	50		0		0		50		50	
Ted Cammari-100-1006	MA	75		0		0		75		25	
William Doane-100-1006	MA	80		0		0		80		20	
AVERAGE		69.2		6.2		2.3		77.7		22.3	

INSTRUCTIONS

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Offered By

PLANITAX

FIG. 5D

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R&D Interviewer - client's administrator access"

File Edit View Favorites Tools Help

Address Links

Main Administrator Access

Current Distributor Is Planitax 176

Selected Distributor: Planitax 174

New Distributor:

Distributor Administrators:

First Name	Last Name	E-mail	Username	Password
Igor	Grubar	igorgrubar@abc.com	James	htmima
Borut	Hrzenjak		Hrzia	htmipu
Seda	Taysi	sedataysi@abc.com	Seda	111
Lisa	Yap	lisa@abc.com	Lisa	Lisa123456
Mark	Cottam		Demo	Demo

New Administrator

Current Company Is ABC"

Select Company: ABC 178

New Company:

Company Logo: ABC 180

Company Name: ABC

Done

FIG. 6